Employee Post-Travel Disclosure of Travel Expenses SEGRETARY OF THE SENAPEMPE

2019 OCT 29 PM 5: 00

Form RE-2

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In compliance with Rebe reimbursed/paid for			osures with respect to	travel expenses that have been	or w
	•	orization (Form RE-1), gertification Form with all		y, invitee list, etc.)	
Private Sponsor(s) (lis	t all): The Aspen In	stitute (Education &	Society)	•	
Travel date(s): Oct. 2	2-3, 2019	·			
Name of accompanyin Relationship to Travel	- ,	ny): Child	<u>. </u>		
IF THE COST OF LODE INCLUDE LODGING Concepts for Employ	COSTS IN EMPLOYEE	EASE DUE TO THE ACC EXPENSES. (Attach addi	COMPANYING SPOUS	SE OR DEPENDENT CHILD, ON	ILY
•	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)	
☑ Good Faith Estimate	\$453	\$150	\$229	N/A	1
☐ Actual Amount					
Expenses for Accomp	panying Spouse or De	ependent Child (if applie	able):		ᆜ
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)	
☐ Good Faith Estimate	N/A	N/A	N/A	N/A]
☐ Actual Amount		-			
Provide a description necessary.):	of all meetings and ev	ents attended. See Senat	e Rule 35.2(c)(6). (A	ttach additional pages if	
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210/24/19 (Date)	Mariso (Printed r	name of traveler)		res R. Mar	<u>ر</u>
ဥ	•		•	(Signature of traveler)	
•		MEMBER/OFFICER:			
I have made a determing Authorization form, are	nation that the expense necessary transportan	es set out above in connection, lodging, and related	d expenses as defined		zvel
10/24/19	<u></u>		M	//	
(Date)			(Signature of Super	vising Senator/Officer)	

(Revised 1/3/11)

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EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the <u>Select Committee on Ethics</u> in <u>SH-220</u>. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC AU626'19pm 4:16

required post-travel disclosure.	
Name of Traveler:	Marisa Morin
Employing Office/Committee: Sens	MRM Her Wyden/ Senate Finance Committee
Private Sponsor(s) (list all): The Aspen Institute, Inc.	c. (Education and Society Program)
Travel date(s): October 2-3, 2019	<u> </u>
Note: If you plan to extend the trip for any reason	on you <u>must</u> notify the Committee.
Destination(s): Charlotte, NC	
Explain how this trip is specifically connected to the trav	veler's official or representational duties:
the wellbeing of children and families (e.g., TANF, subsidized Charlotte and surrounding Mecklenburg County, North Carolin	welfare, child support, and workforce development issues that pertain to employment, child care). The focus of the Aspen Retreat is to examine ha as a case study to understand the difficulties in mobility from poverty opening on the ground. The retreat will have an additional focus on we with the high rates of homelessness in Oregon.
Name of accompanying family member (if any): N/A	
Relationship to Employee: Spouse Child	
I certify that the information contained in this form is tru	e, complete and correct to the best of my knowledge:
8/2-6/19 (Date)	Monso P. Man. (Signature of Employee)
	(Signature of Employee)
TO BE COMPLETED BY SUPERVISING SENATOR/OFFICE Secretary for the Majority, Secretary for the Minority, and Charles	CER (President of the Senate, Secretary of the Senate, Sergeant at Arms, aplain):
Sen. Ron Wyden	by authorize Marisa Morin
(Print Senator's/Officer's Name)	(Print Traveler's Name)
related expenses for travel to the event described above.	nent or reimbursement for necessary transportation, lodging, and I have determined that this travel is in connection with his or her not create the appearance that he or she is using public office for
private gain.	
I have also determined that the attendance of the employed of the Senate. (signify "yes" by checking box)	ee's spouse or child is appropriate to assist in the representation
8/26/19 (Date)	- Mul
(Date)	(Signature of Supervising Senator/Officer)

(Revised 10/19/15)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

Th	e Aspen Institute, Inc. (Education and Society Program)
Des	scription of the trip: Aspen Institute Education and Society program sponsored convening for senior
	cation staffers on mobility from poverty.
Dat	es of travel: October 2-3, 2019
	ce of travel:
Naı	ne and title of Senate invitees: Attached.
l ce	rtify that the trip fits one of the following categories:
×	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. OR 3
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
X	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
	rtify that:
×	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for <i>de minimis</i> lobbyist involvement.
X	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and
	execution of the convening. (see continued response)
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
	The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster
	leadership based on enduring values and provide a non-partisan forum for the exchange of ideas.
	(see continued response)
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	The Aspen Institute has a nearly forty year history of conducting non-partisan educational forums, which
	often include Members of Congress and staff. The Aspen Institute Education and Society program
	has been conducting convenings for Congressional education staff for over twelve years.

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forums, and conferences for a diverse range of attendees including federal and state policymakers						
business and organ	nizational leaders, members	s of the press and t	he general (see cont	inued response		
Total Expenses for Each Participant:						
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expense:		
Good Faith estimate	\$415 (roundtrip coach airfare, local shuttle transportation)	\$130	\$75	none		
Actual Amounts				• •		
	trip involves an event that	is arranged or orga	nized without regard	to congression		
congressional partic	he trip involves an event the ipation: zed specifically with regard		ganized <i>specifically</i> и	vith regard to		
b) The trip is organiz	ipation:		ganized <i>specifically</i> и	vith regard to		
b) The trip is organized on issues related to	ipation: zed specifically with regard	to Congressional s	ganized <i>specifically</i> и	vith regard to		
b) The trip is organized on issues related to Reason for selecting	ipation: zed specifically with regard mobility from poverty.	to Congressional s	staff participation to su	upport their lead		
b) The trip is organized on issues related to Reason for selecting In a recent study by	ipation: zed specifically with regard mobility from poverty. the location of the event of	to Congressional sonal s	staff participation to su	upport their lear		
b) The trip is organized on issues related to Reason for selecting In a recent study by largest metro areas	ipation: zed specifically with regard mobility from poverty. the location of the event of the ev	r trip netty, the Charlotte lity (see continued	staff participation to su	upport their lea		
b) The trip is organized on issues related to Reason for selecting In a recent study by largest metro areas	zed specifically with regard mobility from poverty. the location of the event of Harvard economist Raj Chain the US for upward mobile of hotel or other lodging factors.	r trip netty, the Charlotte lity (see continued	staff participation to su	upport their lear		
b) The trip is organized on issues related to Reason for selecting In a recent study by largest metro areas	zed specifically with regard mobility from poverty. the location of the event of Harvard economist Raj Chain the US for upward mobile of hotel or other lodging factors.	r trip netty, the Charlotte lity (see continued	staff participation to su	upport their lea		

21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:						
	Lodging is \$130 per day, which is \$1 higher than the per diem rate (which changed to \$129 on 10/1/19)						
	Meals are 10/2/19 \$45 per day and 10/3/19 \$30 per day, which is lower than the per diem rate.						
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:						
	Roundtrip coach commercial airfare; local shuttle bus transportation (coach-class)						
	•						
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).						
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:						
	None .						
25.	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor): Signature of Travel Sponsor:						
	Name and Title: Elliot Gerson, Executive Vice President, Policy & Public Programs						
	Name of Organization: The Aspen Institute						
	Address: 2300 N Street NW, Suite 700, Washington, DC 20037						
	Telephone Number: 202-736-5859 (Lisa Jones, Deputy General Counsel)						
	Fax Number: 202-467-0790						
	E-mail Address: lisa.jones@aspeninst.org						



Aspen Retreat for Senior Congressional Staff Network on Mobility from Poverty

One Community's Efforts to Increase Mobility with a Focus on Housing and Social

Omni Hotel 132 E. Trade St. Charlotte, NC 28202

October 2-3, 2019

CONGRESSIONAL STAFF

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THE ASPEN) INSTITUTE

EDUCATION & SOCIETY PROGRAM

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Brian Collier

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Khandi Deitemeyer

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Central Piedmont Community College
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Executive Director
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Scott Farmer

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Chief Executive Officer
Renaissance West Community Initiative
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A. Fulton Meachem, Jr.

President and Chief Executive Officer Charlotte Housing Authority(CHA) 400 East Blvd Charlotte, NC 28203

Dionne Nelson

President and CEO
Laurel Street Residential
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Dee O'Dell

Executive Vice President Consumer Business and Banking U.S. Bank Charlotte, NC 28202

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John C. and Nancy D. Whitehead Chair Senior Fellow - Economic Studies Director - Future of the Middle-Class Initiative Co-director - Center on Children and Families Brookings Institution 1775 Massachusetts Ave., NW Washington, DC 20036

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Caira Woods

Bill & Melinda Gates Foundation 1300 I Street NW Washington, DC 20005 Caira wood@gatesfoundation.org The Aspen Institute Education & Society Program
Appendix to Private Sponsor Travel Certification Form
Senior Mobility from Poverty Retreat, October 2-3, 2019.

Question 5. Name and title of Senate invitees.

Jeff Wrase	Deputy Staff Director	Senate Finance Committee
Jennifer Kuskowski	Policy Advisor	Senate Major Leader McConnell
Ryan Martin	Senior Human Services Advisor	Senate Finance Committee
Amy Marie Pellegrino	Health Policy Director	Senate Special Committee on Aging
Tim Carlton	Policy Advisor	Senator Cassidy
Scott Winship	Executive Director	Senate Joint Economic Committee
Charles Cogar	Legislative Director	Senator Scott
Beth Nelson	Senior Health Policy Advisor	Senate HELP Committee
Laura Berntsen	Minority Chief Human Services Advisor	Senate Finance Committee
Gabriella Camozzi	Legislative Assistant	Senator Durbin
Beth Cooper	Professional Staff	Senate Banking Committee
Nikki McKinney	Professional Staff	Senate HELP Committee
Kara Marchione	Director of Education Policy	Senate HELP Committee
Jordan Hynes	Professional Staff	Senate HELP Committee
Courtney Temple	Legislative Director	Sen. Tillis

Question 12. Briefly describe the role of each sponsor in organizing and conducting the trip (response continued) -- The Bill & Melinda Gates Foundation is not a sponsor of this trip and did not play a role in organizing, planning or conducting the trip. The Foundation provided grant funding to support the Aspen Institute Education & Society Program, including the Aspen Senior Congressional Education Staff Network; however, the Foundation did not earmark any funding for this trip.

Questions 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to the mission (response continued) – The Aspen Institute Education and Society Program seeks to provide a neutral forum to aid education policymakers in their efforts to improve K-12 public education. The purpose of the trip is to conduct a non-partisan educational retreat that encourages off the-record, candid exchanges of ideas to support staffers' learning.

Question 15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips) (response continued) – The Aspen Institute organizes numerous

educational activities, including educational briefings, roundtables, forums and conferences for a diverse range of attendees including federal and state policymakers, business and organizational leaders, members of the press and the general public. The Aspen Institute Education and Society Program works with federal, state and local education leaders to improve K-12 student achievement, particularly for underserved students.

Question 18. Reason for selecting the location of the event or trip (response continued) -- Staff will hear from Charlotte leaders about their response to this finding and what factors contributed to the ranking.



Aspen Retreat for Senior Congressional Staff Network on Mobility from Poverty

One Community's Efforts to Increase Mobility with a Focus on Housing and Social Capital

Omni Hotel 132 E Trade St. Charlotte, NC 28202

October 2 - 3, 2019

AGENDA

Retreat Goals:

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- Deeply examine how Charlotte and surrounding Mecklenburg County, North Carolina, are responding to low rates of mobility from poverty through significant private-sector, non-profit, philanthropy, and publicsector coordination;
- Directly engage with low-income North Carolinians and direct-service providers to understand their experiences, as well as with business and government leaders and policy experts to understand how federal funding and policies are influencing the work in Charlotte and Mecklenburg County;
- Examine how housing policies and decisions enable and/or inhibit proximity to employment opportunities
 and the crucial role social capital plays in mobility from poverty;
- Engage in active learning and build working relationships with experts and practitioners from various fields of expertise, as well as with colleagues from different parties and chambers.

Wednesday, October 2, 2019

8:30 — 9:30 AM	Participants arrive at Charlotte airport (see p. 6 for flight information)
9:30 - 10:00 AM	Participants arrive at Omni Hotel
	Transportation to Omni Hotel, 132 E Trade St., Charlotte, NC 28202
11:00 AM	Aspen staff and participants will depart hotel on chartered bus for Renaissance West Community Initiative, 3610 Nobles Ave, Charlotte, NC
11:30 AM	Arrive at Renaissance West Community Initiative
	Location: 3610 Nobles Ave, Charlotte, NC
11:30 – 12:30 PM	Working Lunch – Welcome, Introductions, Overview of Convening
	Location: Renaissance West Community Initiative

Faculty:

• Ross Wiener, Aspen Institute

After introductions and context-setting, Congressional staff and faculty members will share two learning objectives for the convening.

12:45 - 1:00 PM

Break

12:45 - 2:00 PM

Session I: Understanding the Charlotte context: Leading on Opportunity Task Force

Faculty:

- Dr. Ophelia Garmon-Brown, SVP, Community Wellness and Education,
 Novant Health, Co-chair, Leading on Opportunity Task Force
- Mr. Dee O'Dell, Senior Vice President, US Bank, Co-chair, Leading on Opportunity Task Force and US Bank

Guiding questions:

- What provoked the Leading on Opportunity Task Force? What motivated each of you
 to invest in leading this effort as co-chairs? What are your most important learnings
 about mobility, and about Charlotte, as a result of co-chairing the Task Force?
- How did the Leading on Opportunity Task Force determine the cross-cutting factors
 of racial segregation and social capita, and the specific content areas the Task Force
 ultimately agreed on? What were other important ideas you explored but ultimately
 did not prioritize, and why?
- What are your reflections two and a half years since publication of the Task Force Report? Where has progress been swifter and deeper than you anticipated, and what challenges and emerging issues are most important to acknowledge and address?

2:00 - 2:15 PM

Break

2:15 - 5:15 PM

Site visit: Renaissance West Community Initiative

Key site visit participants:

- William "Mack" McDonald, CEO, Renaissance West Community Initiative and other RWCI staff
- Ann Clark, RWCI Board Member, former Superintendent of CMS

Timeline:

- Introduction and tour of the RWCI facility (30 minutes):
- RWCl panel discussion (45 mins)
- Small group roundtables with RWCI families and service providers (75 minutes)
- Reflection on conversations (30 minutes)

Guiding questions for panel discussion:

- What is the history of the Renaissance West Community Initiative (RWCI)? How does it reflect Charlotte's history and urban development, and how is it unique?
- What is the profile of RWCI residents and beneficiaries? Who is not able to be served by RWCI and what are alternatives in Charlotte and Mecklenburg County

- How do Federal programs support RWCI efforts to serve Charlotte, like Hope IV, housing vouchers, and/or the Community Development Block Grant, as well as others? What additional state and local programs support RWCI? What role does philanthropy play in RWCI?
- What are the lessons from RWCI that should inform future investment and policy?

For break-out discussions:

- How is RWCI different from the community you lived in previously? How do you access the services that RWCI offers, and how does RWCI facilitate your engaging in the broader Charlotte community? What do you wish you could change about RWCI?
- Who are the primary partners of RWCI and what services are offered here? What facilitates coordination across service providers, and what makes coordination hard?

5:15 – 6:00 PM Transportation to Hotel

Location: Omni Hotel, 132 E Trade St., Charlotte, NC 28202

7:00 – 7:30 PM Transportation to Dinner

Location: Community Culinary School of Charlotte (CCS), 9315-D Monroe Road, Charlotte, NC

7:30 – 9:00 PM Networking Dinner with Expert Faculty

Staffers will have the opportunity to network with participants during the reception.

Remarks by Richard Reeves, Brookings Institution

9:00 – 9:30 PM Transportation to Hotel

Location: Omni Hotel, 132 E Trade St., Charlotte, NC 28202

Thursday, Oct. 3, 2019

8:00 – 8:30 AM Walk to Foundation for the Carolinas

Location: 220 N. Tryon St. #2137; Charlotte, NC 28202

8:30 – 9:00 AM Continental Breakfast

9:00 - 10:15 AM

Session II: Affordable Housing and Mobility: Lessons for Policy

Faculty:

- Anthony Trotman, Assistant County Manager, Mecklenburg County
- Dionne Nelson, Laurel Street Residential
- Fulton Meachem, President and Chief Executive Officer, Charlotte Housing Authority
- Scott Farmer, Executive Director, North Carolina Housing Finance Agency

Guiding questions:

- What's the status of affordable housing in Charlotte relative to demand? What are promising developments that have been spurred by the Leading on Opportunity Task Force? What are the major impediments to expanding access to affordable housing in Charlotte?
- What are the respective roles of the City of Charlotte, Mecklenburg County, and the State of North Carolina in advancing affordable housing? How has collaboration across governing entities changed – or not – since the Leading on Opportunity Task Force Report? How does state policy set the context in which this work happens, and what are the practical and political dynamics that are most important to understand?
- What federal programs are impacting access to affordable housing in Charlotte?
 Who administers these federal grants/incentives, and how are these resources influencing mobility work in Charlotte? What is the importance and role of the Local Initiatives Support Corporation (LISC)?
- How is gentrification, and the rising cost of housing, impacting access to affordable housing? In what ways is historic segregation being either addressed or exacerbated as Charlotte continues to grow and develop – both in terms of market developments and public-private partnerships seeking to advance mobility?

10:15 - 10:30 AM

Break

10:30 - 11:45 AM

Session III: How Social Capital Enables Productive Relationships and Mobility

Faculty:

- Molly Shaw, President and CEO, Communities In Schools (CIS), Charlotte-Mecklenburg
- Federico Rios Assistant Manager Equity and Immigration Integration, Charlotte
- Kandi Deitemeyer, President, Central Piedmont Community College

Guiding questions:

 What is being done to build social capital that increases mobility? How is social capital being defined for the mobility efforts underway in Charlotte?

CD



- What's working, and where are the biggest opportunities to increase social capital?
 What are you learning about the challenges in building social capital that increases mobility?
- 20 years ago, Robert Putnam identified Charlotte as among the lowest in interracial trust and informal socialization across segregated communities. How are recent efforts to intentionally increase social capital addressing this legacy?
- How are faith communities and the private sector supporting and participating in the efforts to improve Charlotte's social capital?
- How is social capital being measured, for baseline and progress? How are interim measures being developed defined to measure growth to a goal or set of goals, and how can activities be aligned to those measures and goals to create a systemic, measurable, and accountable approach to increasing social capital?

11:45 – 12:30 PM Working Lunch with discussions of previous sessions

12:30 – 1:45 PM Session IV: Leading on Opportunity: Update on Progress

Faculty:

- Stephanie Kripa Cooper-Lewter, Executive Director, Leading on Opportunity
 Council
- Laura Clark, President and CEO, United Way of Central Carolinas
- Brian Collier, Executive Vice President, Foundation for the Carolinas
- Alanna Williams, Policy Associate, Opportunity Insights
- Rob Kelly, President and CEO, FORCLT

Guiding questions:

- How is the Leading on Opportunity Council advancing the recommendations of the Leading on Opportunity Task Force? How are public and private entities supporting and participating in this work?
- What are the biggest successes to date? How are those successes being measured and communicated?
- What are the biggest learnings in this work? What are the biggest challenges in advancing mobility in Charlotte, and what lessons would you share with others who want to advance a mobility agenda?
- How are federal programs specifically being utilized as part of these efforts, and what changes in policy would be most important in unlocking greater progress?

1:45 - 2:00 PM Break

2:00 – 3:00 PM Session V: Implications for Federal Policy

Faculty will be encouraged to share one take-away and one suggestion for ways in which the federal role can play a more effective role in Charlotte's efforts. The majority of time will be used for staff to engage with faculty and each other in considering Charlotte's efforts in the federal context.

3:00 – 3:15 PM Break + Complete Retreat Evaluation



3:15 - 3:50 PM

Final Discussion

Congressional staff participants will share their take-aways and ideas for further exploration, future site visits and/or events in DC, and ideas/issues that are ripe for policy development.

3:50 PM

Adjourn

Staffer Arrival/Departure Times

Кага	Marchione	AA 400	10/2	8:38 AM	10/3	6:08 PM
Ryan	Martin	AA 400	10/2	8:38 AM	10/3	6:08 PM
Marisa	Morin	AA 400	10/2	8:38 AM	10/3	6:08 PM
Scott	Winship	AA 400	10/2	8:38 AM	10/3	6:08 PM
Jeffrey	Wrase	AA 400	10/2	8:38 AM	10/3	8:16 PM



August 14, 2019

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming Mobility from Poverty retreat for Senior Congressional Staff from 11:30 AM Wednesday, October 2, 2019 to 4:00 PM Thursday, October 3, 2019 at the Omni Hotel, 132 E Trade St., Charlotte, NC 28202.

At this convening, staffers learn about how economic mobility has changed over time and the challenges affecting policymakers' efforts to increase economic mobility in America. Charlotte is an extraordinary context for learning about mobility from poverty efforts because of unprecedented government, private-sector, philanthropic, and civil society engagement and coordination on this topic. Harvard economist Raj Chetty identified Charlotte as the major metropolitan area in the United States with the least upward mobility among its young people, which provoked the *Leading on Opportunity* task force and resulting recommendations that create a frame for our site visit and learning together. Staffers will learn about recent evidence on the effectiveness of interventions designed to address the impact of segregation and the role of social capital in accessing opportunity. The convening will focus on potential roles for Congress and the executive branch in increasing mobility from poverty and will create opportunity for dialogue with beneficiaries, service providers, and local/state policymakers. Finally, the retreat will provide an opportunity for staffers to engage in their own learning and build working relationships with colleagues from different parties and chambers and with leading experts in the field.

We are committed to working with you and the House Ethics Committee to ensure compliance with the House rules regarding privately-funded sponsored travel. Enclosed you will find all the forms necessary for filing the trip with the Ethics Committee:

A detailed agenda listing discussion sessions

- A completed Primary Trip Sponsor Form
- A list of invited House staffers
- A blank Traveler Form
- Completed Grantmaking Trip Sponsor Form from the Bill & Melinda Gates Foundation

You must complete the Traveler Form and submit it with the enclosed agenda, list of invited staffers, and Primary Trip Sponsor Form directly to the Senate Ethics Committee (220 Hart) no later than Friday, August 30, 2019. After receiving the completed travel package, the Ethics Committee will review and issue an approval to you or your sponsoring Member. After the trip, you will need to complete a post-travel form that we will email to you after the site visit.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations – no government, individual, foreign, corporate, or special interest money is accepted. The retreat is supported by The Bill & Melinda Gates Foundation. The Aspen Education & Society Program maintains autonomy over invitations, materials, and the agenda for the retreat.

The retreat will begin at 11:30 AM on Wednesday, October 2, 2019, at Omni Hotel and will conclude at 4:00 PM on Thursday, October 3, 2019. Please plan your travel accordingly in order to be present for the duration of the retreat. Dress is business casual for all meetings.

The retreat promises to be productive and informative. We look forward to seeing you there.

Warm regards,

Ross Wiener

Doug Mesecar